

LA TEST # 4

FORMS INCLUDED: FORM 1040A, 1099-R (3)

Form 1040A:

Taxpayer's first name, initial, last name	LATEST P BARRELL
Taxpayer's social security number	400-00-4305
Home address (number and street)	25000 HAM AND BACON JUNCTION
City, state, and zip	BATON ROUGE LA 70802
Taxpayer's Presidential Election Campaign Fund	YES
Filing status	QUALIFYING WIDOW(ER)
Year spouse died	2005
Line 6a: Yourself (exemption)	X
Number of boxes checked on 6a and 6b	1
Line 6c: Dependent #1: Name	ROLAND BARRELL
Social security number	400-55-3006
Relationship	SON
Number of children who lived with you	1
Line 6d: Total number of exemptions claimed	2
Line 8a: Taxable interest	5500
Line 8b: Tax exempt interest	8700
Line 11b: Taxable amount of IRA distributions	2500
Line 12b: Taxable amount of pensions and annuities	8000
Line 15: Total income	16000
Line 21: Adjusted gross income	16000
Line 22: Enter amount from line 21	16000
Line 23a: You were born before January 2, 1941	X
Total boxes checked	1
Line 24: Standard deduction	11300
Line 25: Subtract line 24 from line 22	4700
Line 26: Multiply \$3300 by the total number of exemptions claimed on line 6d	6600
Line 27: Taxable income	0
Line 28: Tax	0
Line 30: Credit for elderly or disabled	0
Line 35: Total credits	0
Line 36: Subtract line 35 from line 28	0
Line 38: Total tax	0
Line 39: Federal income tax withheld	0
Line 40: Estimated tax payments and overpayment applied	0
Line 43: Total payments	0
Line 44: Overpaid	0
Line 45a: Amount refunded	0
Line 45b: Routing number	XXXXXXXXXX
Line 45d: Account number	XXXXXXXXXXXXXXXXXXXX
Line 46: Applied to estimated tax	0
Third party designee:	YES
Designee's name	JOHN DOE
Designee's phone number	888-555-1111
Designee's personal identification number	(PIN) 11122
Taxpayer's occupation:	RETIRED

LA TEST # 4

Form 1099-R #1:

Payer's name, street address, city, state, and zip

Payer's federal identification number

Recipient's identification number

Recipient's name

Recipient's street address

Recipient's city, state, and zip

Box 1:Gross Distribution

Box 2a:Taxable amount

Box 7:Distribution code

Box 11:State/payer's state number

OUR SHARE BANK & TRUST

72 MARKET PLACE

PIG TOWN LA 70830-7272

72-7754541

400-00-4305

LATEST P BARRELL

25000 HAM AND BACON JUNCTION

BATON ROUGE LA 70802

2500

2500

7 IRA/SEP/SIMPLEX

LA 2568946001

LA TEST # 4

Form 1099-R #2:

Payer's name, street address, city, state, and zip

Payer's federal identification number

Recipient's identification number

Recipient's name

Recipient's street address

Recipient's city, state, and zip

Box 1:Gross Distribution

Box 2a:Taxable amount

Box 4:Federal income tax withheld

Box 7:Distribution code

Box 11:State/payer's state number

WECAN DUETTE LOBBYISTS

1000 BUCKS ST

PIG TOWN MD 21230

72-9081726

400-00-4305

LATEST P BARRELL

25000 HAM AND BACON JUNCTION

BATON ROUGE LA 70802

4500

4500

0

7

LA 329856001

LA TEST # 4

Form 1099-R #3

RETIREMENT DATE (091986)

Payer's name, street address, city, state, and zip

Payer's federal identification number

Recipient's identification number

Recipient's name

Recipient's street address

Recipient's city, state, and zip

Box 1:Gross Distribution

Box 2a:Taxable amount

Box 4:Federal income tax withheld

Box 7:Distribution code

Box 11:State/payer's state number

Box 12:State Distribution

LOUISIANA TEACHERS RETIREMENT

123 SOMEWHERE ST

BATON ROUGE LA 70808

72-9081728

400-00-4305

LATEST P BARRELL

25000 HAM AND BACON JUNCTION

BATON ROUGE LA 70802

3500

3500

0

7

LA 4329865001

3500